

Cayuse SP – UC Davis

Role Managers Guide

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Role Definitions

Roles	Description
IPF Approver	<p>Has signing authority to review and approve proposals on behalf of his or her department.</p> <ul style="list-style-type: none"> • See the IPF Approvers Guide for details on this role. • Although all IPF Approvers in a department receive an email when a proposal requires review, only one IPF Approver is required to approve/reject the proposal. • If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as an IPF Approver, the unit lead must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Role Manager	<p>Designated by the Dean or Department Head to add and remove roles for departmental personnel within Research Contacts.</p> <ul style="list-style-type: none"> • Department Chairs/Center Directors and/or Deans may request a Role Manager be added to their unit by emailing ORCayuseHelp@ucdavis.edu. • The Role Manager updates his or her department's Research Contacts listings as personnel or job responsibilities change. • For backup purposes, the Sponsored Programs Office (SPO) recommends each department have at least two Role Managers.
Pre-Award Spending Approver	<p>Has signing authority to review and approve Pre-Award (Advance Account) spending requests.</p> <ul style="list-style-type: none"> • See the Pre-Award Spending Approvers Guide for details on this role. • Pre-Award Spending Approvers should additionally be provided the Proposal Data Access role in order to view the Proposal Attachments tab. • Although all Pre-Award Spending Approvers in a department receive an email when a Pre-Award Spending Request requires review, only one approver needs to approve/reject the request. • If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as a Pre-Award Spending Approver, the unit lead must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Proposal Data Access	<p>Can view a department's proposals and access proposals in which the department is named through the Proposals in My Department dashboard.</p> <ul style="list-style-type: none"> • Can perform the following tasks: view the proposal, its IPF and associated attachments; copy the proposal; and prepare a Pre-Award Spending Request for the proposal.
Award Data Access	<p>Can view departmental award data contained in Cayuse SP through the Awards in My Department dashboard.</p>
Research Account Manager	<p>The departmental contact who receives research-related correspondence via email for dissemination to appropriate departmental personnel.</p>

Access Role Management

Option 1: From Research Contacts



Cayuse Research Suite

3.8.0

Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications

- Backbone
- Research Contacts
- Workflow

Application Help

- Research Suite Support Center

Option 2: From Cayuse SP



Cayuse Research Suite

3.8.0

Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

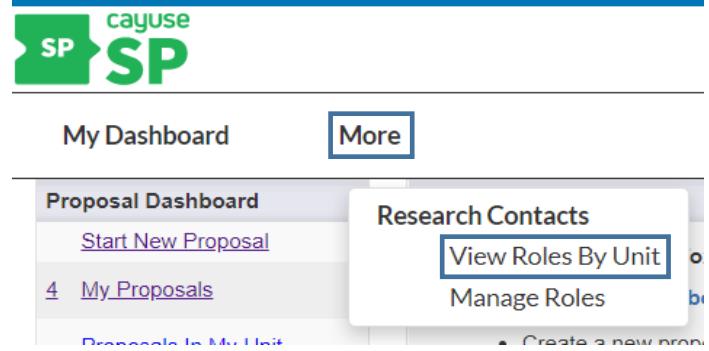
System Administration Applications

- Backbone
- Research Contacts
- Workflow

Application Help

- Research Suite Support Center

Then



View Unit Role Assignments

A one-minute video on viewing/identifying role assignments is available at <https://www.youtube.com/watch?v=6s3bTeVW> 4. If video doesn't start on first try, refresh and try again.

Find the unit.

- You can either click in the **search box** or on **List**.

Contact Directory >> Unit List

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

>> Unit List

To view contact information for a unit, please choose one from the list.

View

University of California Davis (0)

- College of Agriculture/Env Sci (Non Admin/Home Dept) (01)
 - Agr & Env Sci Deans Office (030000)
 - CAES International Programs (030002)
 - Plant Sciences (030003)
 - UC Calfresh Nutrition Ed Prog (030009)
 - Food Chain Admin Cluster (Non Admin Dept) (030050)
 - Animal Science (030045)
 - Nutrition (030200)
 - Ag Biological Science Do (030071)
 - Avian Sciences (030100)
 - EPA Ctr Ecological Hlth Res (030191)
 - Metro Cluster (Non Admin Dept) (030250)
 - Environmental Toxicology (030160)
 - LAWR - Hydrology Program (Non Admin Dept) (030188)
 - Land Air & Water Resources (030190)
 - Wildlife & Fisheries Biology (030350)

Users are listed on the left and the Roles on the right.

>> OVCR - Sponsored Programs

Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie					Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver

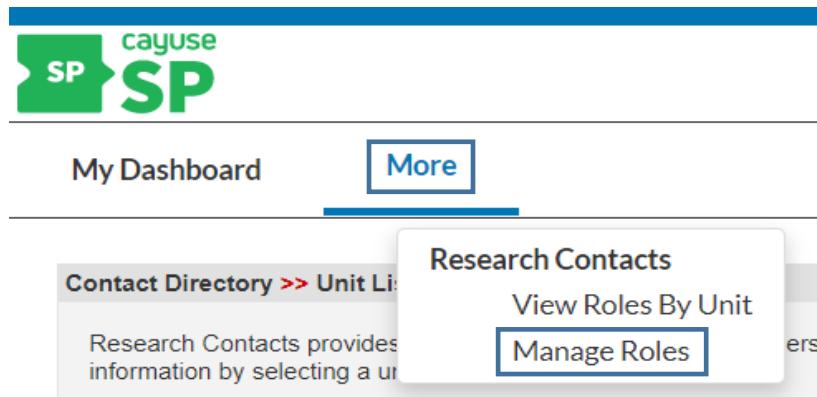
Managing User Roles

A three-minute video on how Role Managers add/remove roles in Cayuse is available at <https://www.youtube.com/watch?v=UYj7rwKOwy0>. If video doesn't start on first try, refresh and try again

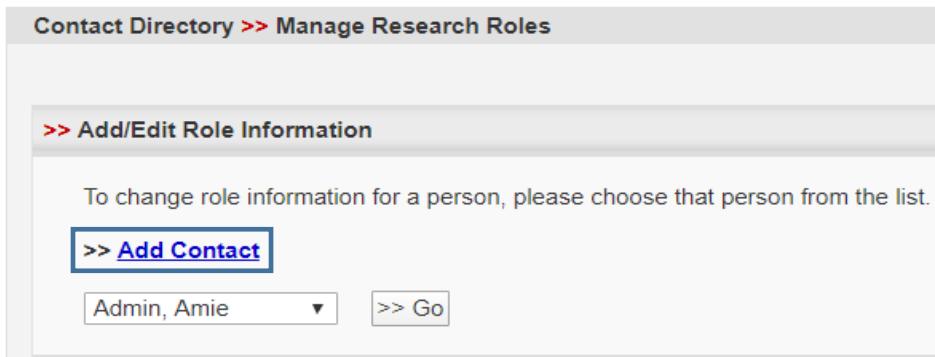
Adding a Research Contact

Role Managers must first add an existing user as a **Research Contact** to assign departmental roles.

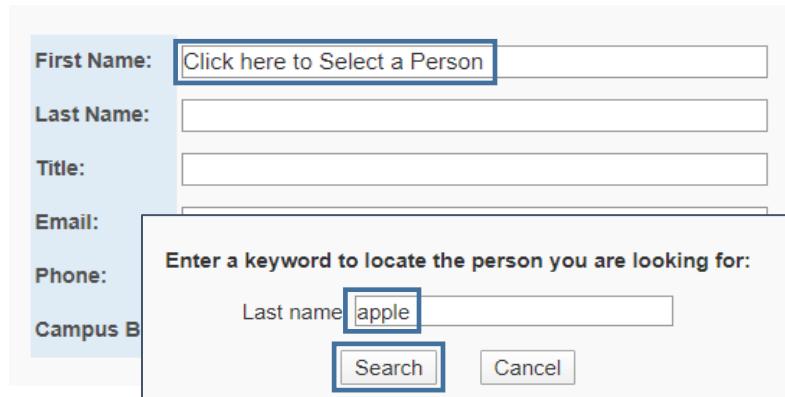
From either **Cayuse SP** or the **Research Contacts** page, select **More** then **Manage Roles**.



If the user is not on the list, select **Add Contact**.



Search for the person to add:



First Name:

Last Name:

Title:

Email:

Phone:

Campus B:

Enter a keyword to locate the person you are looking for:

Last name:

Select the person's name you want to add in the search results.

Personnel Search (choose the person by clicking their name)

[Apple, Charlie](#) OVCR - Sponsored Programs

Select **Add Contact**.

First Name:	Charlie
Last Name:	Apple
Title:	
Email:	
Phone:	
Campus Box:	Davis CA 95618-6153

Adding and Deleting Roles

Once a user is on the Research Contacts list, the associated roles may be viewed and edited.

From either **Cayuse SP** or the **Research Contacts** page, select **More** then **Manage Roles**.

My Dashboard **More**

Contact Directory >> Unit List

Research Contacts provides information by selecting a unit

Research Contacts
View Roles By Unit
Manage Roles

Select the relevant person's name and then select **Go**.

Contact Directory >> Manage Research Roles

>> Add/Edit Role Information

To change role information for a person, please choose that person from the list.

>> [Add Contact](#)

Add a Role

Delete a Role

If you are a Role Manager for multiple units, select the relevant unit.

Role Department:

OVCR - Sponsored Programs

Select Role to add.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼

Please Make A Selection

Award Data Access

IPF Approver
Pre-Award Spending Approver
Proposal Data Access
Research Account Manager

Select Remove Role next to the relevant role.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼

Current Roles:

Role Manager (OVCR - Sponsored Programs)
Proposal Data Access (OVCR - Sponsored Programs)
IPF Approver (OVCR - Sponsored Programs)

Select Add Role.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼